

Appendix D: System Administration (For Coordinators Only)

As the Coordinator you perform system administration functions to provide a User with system access to HUD's secure systems and to assign the User rights to their PHA's data. First, you must establish yourself as a Coordinator in the system. Once established as a Coordinator in the system, you can then retrieve user IDs for registered Users of the PHA(s) you represent. You can assign rights to Users to submit data for your PHA.



— NOTE: Not all links may display the first time you access the system.

The **Secure Systems** main page contains two sections: *Systems* and *System Administration*. The *Systems* section provides underlined links to HUD's secure systems. The list of underlined system links varies based on your rights. The *Systems Administration* section allows you to control system access and update User information (e.g., email address).

— NOTE: In this guide, "user" is a generic term including both Users and Coordinators.

Establishing a Coordinator

The first step in establishing yourself as a Coordinator begins when you receive your HUD user ID from the PHA Executive Director. You can use your HUD user ID and the password submitted in your registration application to log in and set up system rights.

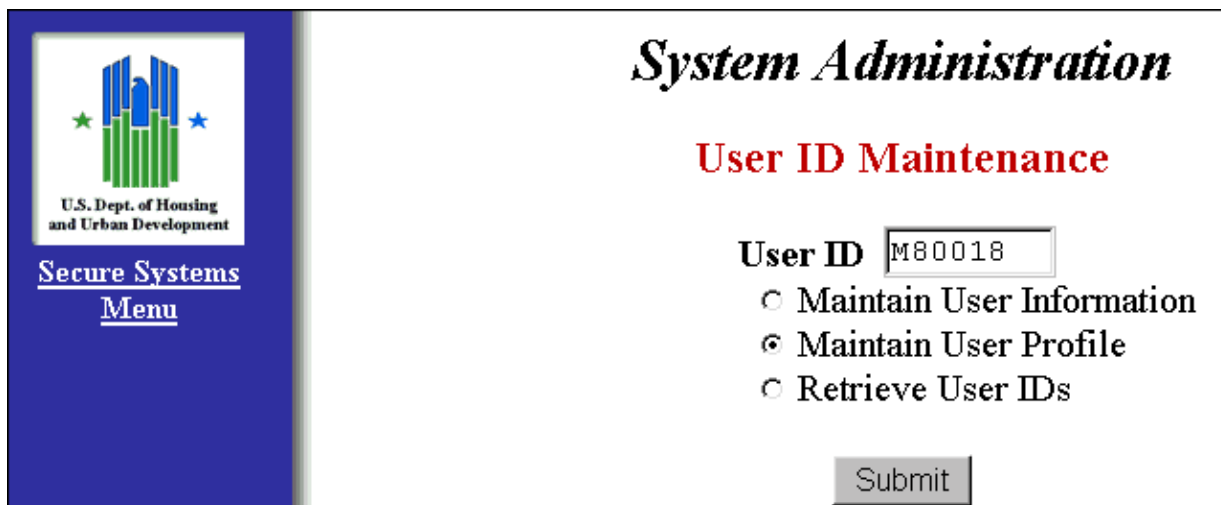
User ID Maintenance

After you log in and reach the **Secure Systems** page, you should perform system administration functions in the following order for the system to recognize you as a Coordinator for FASS-PHA.

To establish yourself as a Coordinator in the system:



1. On the **Secure Systems** main page, under the *System Administration* section, click on the [User ID Maintenance](#) link. The **User ID Maintenance** page displays.



System Administration

User ID Maintenance

User ID

☐ Maintain User Information
☒ Maintain User Profile
☐ Retrieve User IDs

2. Enter your user ID in the *User ID* field. Remember to capitalize the letter in your ID.
 3. Click on the *Maintain User Profile* radio button.
 4. Click on the Submit button. The **Maintain User Profile** page displays.
- NOTE: This Profile page pertains to Coordinators only.

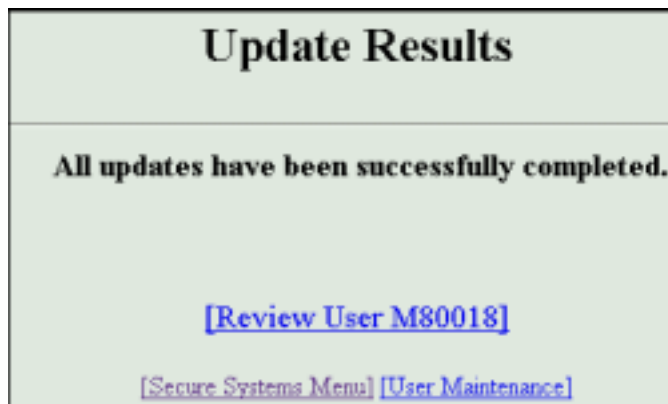


Maintain User Profile
for JOHN J JACOBS(M80018)

System	Add M80018 to:	Remove M80018 from:
<input checked="" type="checkbox"/> FASPHA Financial Assessment Subsystem - PHA	<input checked="" type="checkbox"/> Action(s) Auditor Verification Coordinator Create/Save Submission Finalize a Submission Read Only	
Group(s) - None Defined		

5. Click in the checkbox to the left of *FASPHA* to indicate the system desired.
6. Click in the *Add* checkbox to the left of *Action(s)* to provide yourself the Coordinator action in the system.
7. Click on “Coordinator” from the list to highlight it (this is the only Action you need to select). Use the scroll bar, if necessary.

8. Click on the Submit  button. An **Update Results** page displays, confirming the information has been updated.



- NOTE: To remove the Coordinator action for a system(s), click on the Review User link. The **Maintain User Profile** page displays again. “Coordinator” is now also listed in the Remove column, indicating that the Coordinator is established for FASS-PHA. To delete the Coordinator action for FASS-PHA, click on the Remove checkbox in the last column, highlight “Coordinator,” and click on the Submit button. The **Update Results** page displays again, confirming removal of the Coordinator action for FASS-PHA. To return to the **Secure Systems** page, click on the Secure Systems Menu link.

9. Click on the Secure Systems Menu link. The **Secure Systems** page displays.



Providing Your Users with System Access

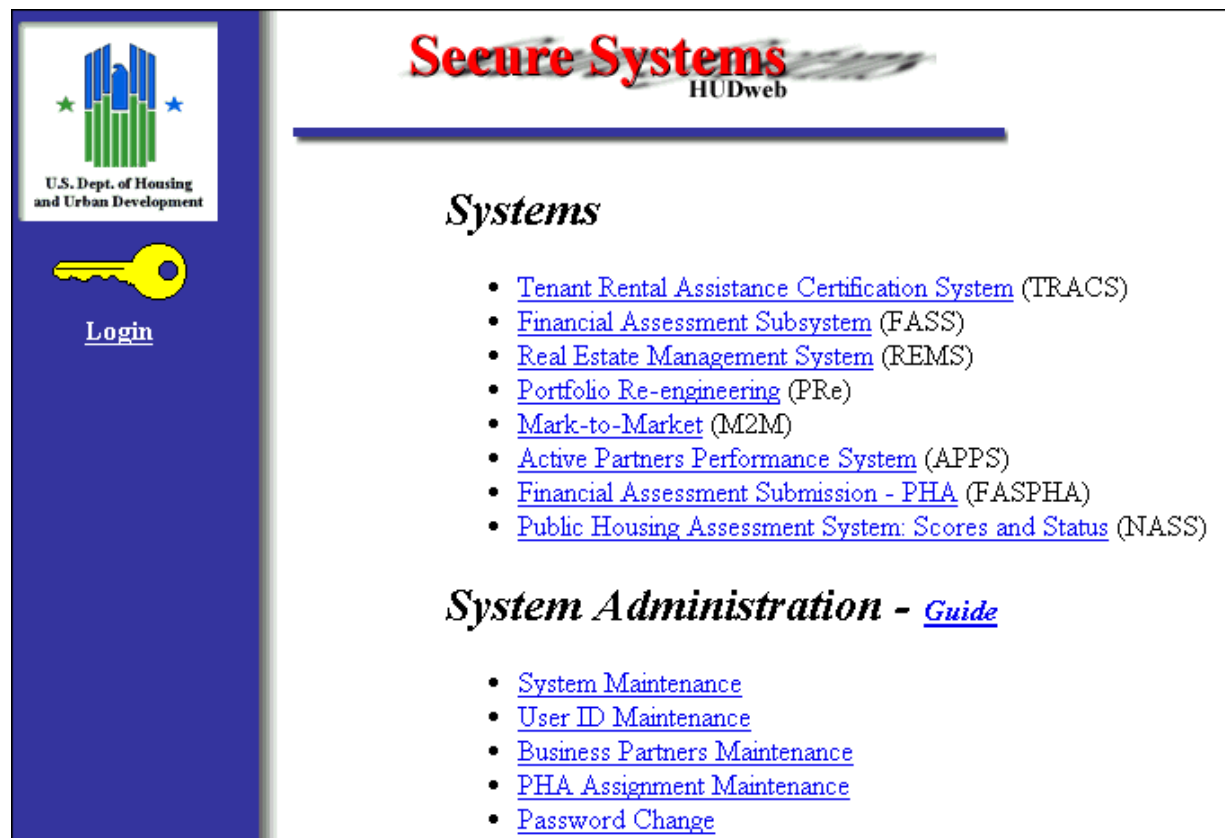
After a User has registered with HUD and notified you (the Coordinator) of their registration, you can retrieve the User's ID from the system. You can also assign the User access rights to FASS-PHA and to the PHA's data. Finally, you provide the User with their user ID.

— **NOTE:** *Registration applications are processed nightly, so allow at least 24 hours between User registration and Coordinator retrieval of the user ID.*

User ID Maintenance

As the PHA's Coordinator, you are responsible for controlling access to the system and the PHA's project data. You should verify a User is authorized to do business for the PHA prior to allowing the User access to FASS-PHA and the PHA's data. The first step in assigning the User system rights is to retrieve the User's ID.

To retrieve a user ID:



1. On the **Secure Systems** main page, under the *System Administration* heading, click on the User ID Maintenance link. The **User ID Maintenance** page displays.

The screenshot shows the 'System Administration' page with a sub-header 'User ID Maintenance'. On the left is a blue sidebar with the HUD logo and 'Secure Systems Menu'. The main content area has a 'User ID' text box followed by three radio buttons: 'Maintain User Information', 'Maintain User Profile', and 'Retrieve User IDs' (which is selected). Below these is a 'Submit' button. At the bottom of the page are several icons: 'Housing HUDweb', 'Send Mail', 'Help', 'Search', 'HUDweb Home', and a 'Back to Top' link with an upward arrow icon.

2. Click on the *Retrieve User IDs* radio button.
3. Click on the Submit button. The **Retrieve User IDs** page displays.

The screenshot shows the 'User Maintenance' page with a sub-header 'Retrieve User IDs'. The left sidebar is identical to the previous page. The main content area contains form fields for 'Last Name' and 'First Name', each with a text box. Below these is a 'Date Range*' section with 'From' and 'To' labels, each followed by a date picker (month, day, year). A red asterisk note states: '*Date range applies to the date on which the user ID was created or last updated.' Below the form fields is a 'Submit' button. At the bottom of the page are a 'Home' link with a house icon and a 'Back to Top' link with an upward arrow icon.

4. Enter the User's *Last Name*.

5. Enter the User's *First Name*.

— **NOTE:** *If entering a date range, use the 2-digit month, 2-digit day, and 4-digit year format. Tab from one field to the next field. The date fields can be used, for example, if you have several Users that registered in the same week and you want to retrieve all of their user IDs simultaneously.*


6. Click on the Submit button. The **User List** page for the PHA displays listing the PHA Code and all Users and their User IDs within the specified date range. **Refer to the User ID column.**

User List				
ID	Last Name	First Name	User ID	Stat
OH001	DAVIS	ANN	M80001	A
OH001	FLAHERTY	REBECCA	M80019	A

Coordinators are listed in bold.

[\[Main Menu\]](#) [\[User Group Maintenance\]](#) [\[User Maintenance\]](#) [\[Retrieve User IDs\]](#)

7. Click on the underlined User Maintenance link to continue setting up a User. The **User ID Maintenance** page displays. (Otherwise, click on the underlined Main Menu link to return to the **Secure Systems** main page.)

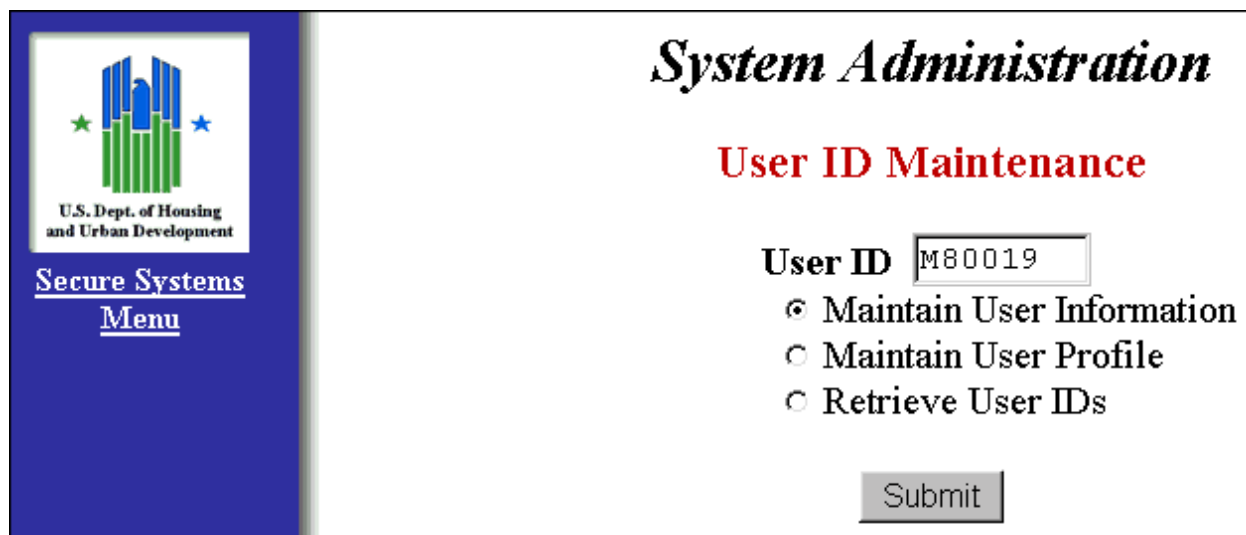
<i>System Administration</i>	
User ID Maintenance	
 U.S. Dept. of Housing and Urban Development Secure Systems <u>Menu</u>	User ID <input type="text"/>
	<input type="radio"/> Maintain User Information
	<input type="radio"/> Maintain User Profile
	<input type="radio"/> Retrieve User IDs
<input type="button" value="Submit"/>	

Next, you must assign an access role to the User, allowing the User to perform the appropriate function in the system. Each role allows a user to perform specific functions for a subsystem.

Role	Description
PHA Director (PID)	This role is for the PHA Executive Director. The user can create and save draft submission data and submit final data to REAC.
PHA Analyst (FIA)	This role allows the user to create and save draft submission data.
PHA Submitter (SMT)	This role allows the user to create and save draft submission data and submit final data to REAC.
CPA Verifier (CPV)	This role is for the CPA agent. The user can perform the agreed upon procedures relating to the PHA's submission.

To assign an access role to a User:

1. On the **User ID Maintenance** page, enter the User's ID in the *User ID* field. (If starting from the **Secure Systems** main page, first click on the underlined User ID Maintenance link to access the **User ID Maintenance** page.)



System Administration

User ID Maintenance

User ID

☒ Maintain User Information

☐ Maintain User Profile

☐ Retrieve User IDs

2. Click on the *Maintain User Information* radio button.

Maintain User Information

User ID: M80019

First Name: REBECCA

Middle Initial:

Last Name: FLYNN

e-Mail Address: rf@aol.com

Organization	User Status	User Type	Coordinator
ID: OH001	<input checked="" type="radio"/> Active <input type="radio"/> Terminated	PHA user/Business Partner	<input type="radio"/> Yes <input checked="" type="radio"/> No

☐ Assign Role(s)☐ Delete Roles(s)

FASPHA - FASS PHA Submitter
FASPHA - HUD Guest User
FASPHA - PHA Analyst
FASPHA - PHA Director
MASS - MASS - PHA Director
MASS - MASS - PHA User
RASS - PHA Certifier
RASS - PHA Submitter
RASS - REAC RASS Third Party Contractors

Update

[\[Main Menu\]](#) [\[User Group Maintenance\]](#) [\[User Maintenance\]](#)

3. Click on the Submit button. The **Maintain User Information** page displays.

— **NOTE:** The user ID is confirmed at the top of the page. The majority of the fields presented on the page, however, come from registration information, including name, e-mail address, and PHA organization name and code. The default status is “Active,” which is appropriate for a new or current user. “Terminated” inactivates the user ID, restricting access to HUD’s secure systems. For example, if a User will be on extended leave, their user ID should be terminated until their return.

4. To assign a role, click on the checkbox next to *Assign Role(s)*.

5. Click on the appropriate role to select it from the list. To select multiple roles, hold down the Ctrl key and click on the roles.

6. Click on the Update button. The **Update Results** page displays, confirming the role update was successful.



— NOTE: To review the current role, click on the Review User link. The **Maintain User Information** page displays again. The role now displays in the right column under *Delete Role(s)* to allow you to delete the currently assigned role if necessary. When deleting a role, remember to first check the checkbox next to *Delete Role(s)* and highlight the role before clicking on the Submit button.

7. Click on the underlined Secure Systems Menu link. The **Secure Systems** page displays.



PHA Assignment Maintenance


In addition to a system role, the User must also be assigned to the PHA. As the Coordinator, you can only assign Users to the PHA(s) you represent.

To assign a PHA to a User:




1. Go to the **Secure Systems** main page, under the *System Administration* heading, click on the [PHA Assignment Maintenance](#) link. The **PHA Assignment Maintenance** page displays.

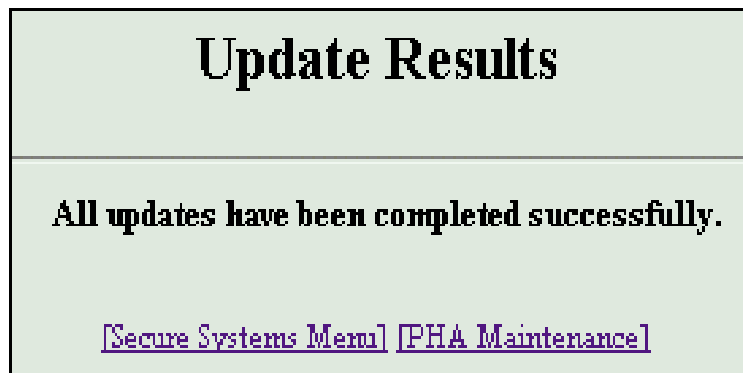
The screenshot shows the 'System Administration' page with the title 'PHA Assignment Maintenance'. On the left is a blue sidebar with the U.S. Dept. of Housing and Urban Development logo and a 'Secure Systems Menu' link. The main content area has a 'User' field with 'M80019' entered. Below it are two radio buttons: 'Assign PHA' (selected) and 'View or Unassign PHA'. A red instruction states: 'For Assignment, provide one of the following, or leave blank for all:'. This is followed by 'PHA ID' and a text input field, and 'or State' and a dropdown menu. Below these is a red instruction: 'If selected criterion is State, sort the results by:'. This is followed by two radio buttons: 'PHA ID' and 'Name' (selected). At the bottom right is a 'View Selection' button.

2. Enter the User's ID in the *User* field.
3. Click on the *Assign PHA* radio button.
4. Enter the PHA code in the *PHA ID* field or click on the right drop-down arrow to select a state in the *State* field. Click on a state from the list to select it. If selecting by state, sort the criteria by clicking on either the *PHA ID* or *Name* radio button.
5. Click on the View Selection  button. The **Assign PHA For User** page displays.

The screenshot shows the 'Assign PHA For User M80019' page. It has a light green background. At the top is the title 'Assign PHA For User M80019'. Below it are two columns: 'Roles' and 'PHAs'. Under 'Roles' are two dropdown menus: 'FASS PHA Submitter (SMT)' and 'MASS - PHA User (PHU)'. Under 'PHAs' is a dropdown menu showing 'OH001 COLUMBUS METROPOLITAN HOUSING AUTHORITY'. Below these is an 'Update' button. At the bottom are four links: '[Main Menu]', '[User Group Maintenance]', '[User Maintenance]', and '[PHA Maintenance]'.

6. Select the appropriate User *Role* from the list by clicking on the selection to highlight it.

7. If the User is assigned to more than one PHA, select the appropriate *PHA* from the list by clicking on the selection to highlight it. Hold the Ctrl key down and click to select multiple PHAs.
8. Click on the  button. The **Update Results** page displays.



9. Click on the PHA Maintenance link to return to the **PHA Assignment Maintenance** page and review your selections. (Otherwise, click on the underlined Main Menu link to return to the **Secure Systems** main page.)

To review a User's current PHA assignments:

1. On the **PHA Assignment Maintenance** page, enter the User's user ID in the *User* field. (If starting from the **Secure Systems** main page, first click on the underlined PHA Assignment Maintenance link to access the **PHA Assignment Maintenance** page.)

System Administration

PHA Assignment Maintenance

User

☐ Assign PHA ☒ View or Unassign PHA

For Assignment, provide one of the following, or leave blank for all:

PHA ID

or State

If selected criterion is State, sort the results by:

☐ PHA ID ☒ Name

2. Click on the *View or Unassign PHA* radio button.
3. Click on the View Selection button. The **Unassign PHA** page displays, listing the PHAs to which the User is currently assigned.

Unassign PHA For User M80019

PHA ID	PHA Name	Role Code
<input checked="" type="checkbox"/> OH001	COLUMBUS METROPOLITAN HOUSING AUTHORITY	SMT

[\[Main Menu\]](#) [\[User Group Maintenance\]](#) [\[User Maintenance\]](#) [\[PHA Maintenance\]](#)

4. Click on the [PHA Maintenance](#) link to assign additional PHAs; or click the [User Maintenance](#) link to assign roles or update User information; or the [Main Menu](#) link to return to the **Secure Systems** page.



To delete a User's rights to a PHA:

1. On the **PHA Assignment Maintenance** page, enter the User's HUD ID in the *User* field.

2. Click on the *View or Unassign PHA* radio button.

3. Click on the View Selection  button. The **Unassign PHA** page displays, listing the PHAs currently assigned to the User.

4. Click on the checkbox to select the PHA to unassign. The User will no longer have access to that PHA's data.